

## NEW NIELSEN SUMMARY PERFORMANCE - DECEMBER 1990

### INDUSTRY

The industry recorded the second consecutive month of modest volume losses with December only down -0.2%. The growth of the Sub-Generic category which has improved 3.1 share points vs. last year may have been partially responsible.

### TOTAL PM-USA

PM-USA's 1.0 point share advance is below previous months share gains due to Marlboro's weakening share performance in Region 1 and continued share loss in Regions 3 and 4. Also, slower share growth in PM's Price Value brands have been reported in December. Despite this performance, PM-USA's volume percent change gain vs. last year of 2.4% is still above its average for the year.

### PM-USA BRANDS

- Marlboro's volume was down 1.9% and share was off -0.4 vs. year ago, with accelerated declines in the Full Flavor packings and weakening in Lights.
- Benson & Hedges and Merit shares have been stable for the past five months.
- Cambridge recorded a share decline of almost 0.2 in December, following its November Smart Money promotion, however it was up 0.1 points vs. a year-ago.
- Bristol, FVB and Bucks shares, despite being below current expectations, are contributing 1.1, 0.8 and 0.5 share points respectively.

### COMPETITIVE ACTIVITY

- R.J. Reynolds continues to record the largest volume and share declines in the industry as its major emphasis of increased coupon support (51% of total volume) does not appear to have had a significant impact. Despite Camel Ultra Lights registering a 0.2 share in its first month at retail, total Camel Filter's December share was flat.
- Liggett's strong performance appears to be softening as a result of static Pyramid sales.

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